ClickMeeting for
salesforce

ClickMeeting for Salesforce

User Manual

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Introduction

ClickMeeting for Salesforce is an application that enables you to use Salesforce to schedule, import, and manage ClickMeeting events. It is available at the Salesforce AppExchange.

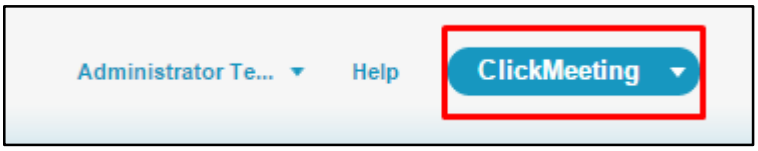
With ClickMeeting for Salesforce, you can:

- Import ClickMeeting events, documents and recordings, and view related data using Salesforce.
- Use your Salesforce account to schedule and start ClickMeeting events and browse event-related data and files such as attendance, polls statistics, documents, and recordings.
- Invite Salesforce Leads and Contacts to ClickMeeting events.

Admin Manual

Installation Package

ClickMeeting app - After installing the ClickMeeting package, your Salesforce account will have access to the ClickMeeting app. If you select the app from the drop-down list at the top right corner, your Tab bar will include a ClickMeeting Tab. If you are an assigned ClickMeeting Administrator, your Tab bar will include a ClickMeetingAdmin tab.



Predefined permission sets – The installation package includes three predefined permission sets that the System Administrator can assign to users:

- **ClickMeeting Viewer** – Users with read-only permission can view ClickMeeting events created in a department or work group.
- **ClickMeeting Creator** – Hosts and presenters can create ClickMeeting events, view events created in his or her organization, and edit them when assigned as owner.
- **ClickMeeting Administrator** – An Administrator has all the rights of a ClickMeeting Creator plus access to the ClickMeetingAdmin tab for configuring the app.

Profile settings – An Administrator can install predefined profiles and grant permission to profiles from a predefined ClickMeeting profile.

ClickMeeting buttons - Use the Page Layout Editor to add an **Invite to Meeting** button to the preview pane. The button sends meeting invitations to Salesforce Contacts and Leads.

ClickMeeting Sample Layouts - Layouts for Contacts and Leads include fields that display data related to the user's Chat and Poll Answers.

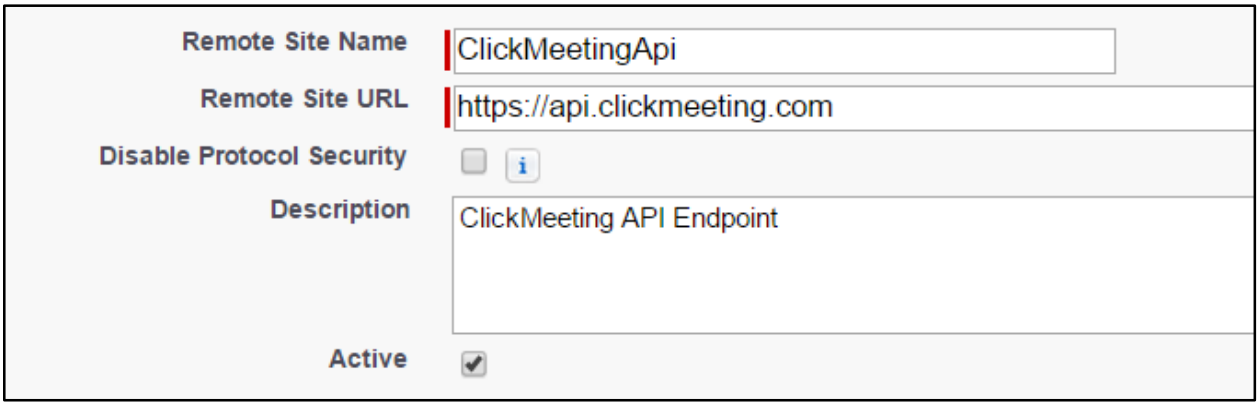
> **Note:** To customize page layouts, click Edit Layout. Drag and drop lists and buttons from the palette to the preview pane.

Installing and Configuring the Application

- Download app from the AppExchange and install it in your organization's Salesforce account.
- Assign the ClickMeeting Administrator permission set to yourself for access to the **ClickMeetingAdmin** tab.
- Go to **ClickMeetingAdmin** tab to view and download the Application Manual
- Fill in requested data on the Configuration Page:
    - **Endpoint URL** – Define the URL where service is available. Default is version 1 of ClickMeeting API.
    - **ClickMeeting API Key** – Enter unique identifier generated by ClickMeeting. Learn more at http://dev.clickmeeting.com/api-doc/
    - **Invitation Language** – Choose a language for your invitations.
    - **Synchronization Start Date** – All ClickMeeting events created on or after the start date will synchronize with ClickMeeting for Salesforce.
    - **Synchronization Frequency** – Choose the estimated number of API calls this app will use daily, depending on the number of rooms used.
    - **Synchronization Content Owner** – Define default owner of ClickMeeting records created in Salesforce.
    - **Schedule synchronization** – Click the Create jobs button to start synchronization.
    - **Connection Status** – View the status of your connection.
    - **Test Connection** – Use the Ping button to test your connection.
- Assign permission sets to users.

- Add ClickMeeting buttons and related lists to page layouts for Contacts and Leads or assign **ClickMeeting Sample Layouts** to user profiles.
- To ensure accurate layout appearance, go to Setup >> Translation Workbench >>Translation Settings and click to enable the Translation Workbench, currently available in English only.

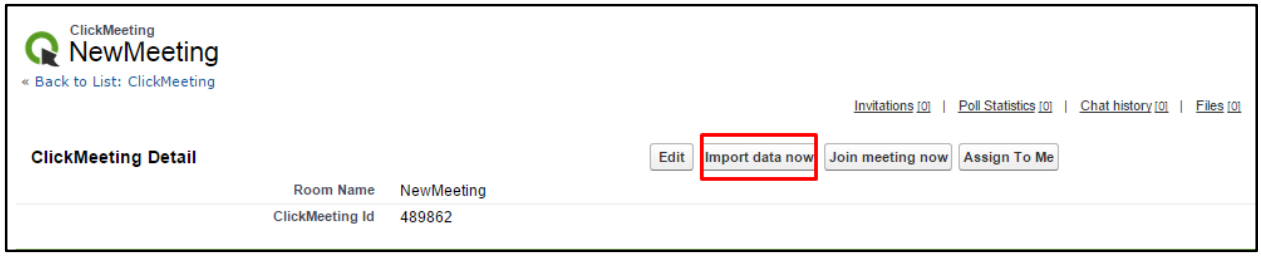
  Note: If your connection fails, check the Endpoint URL and API Key. Go to Setup >> Security Controls >> Remote Site Settings to verify that ClickMeeting Remote Site URL appears as a site your organization can invoke from Salesforce. To add a ClickMeeting remote site, click New Remote Site, fill in required fields, mark the Active checkbox, and click Save.



Syncing Events

There are two ways to sync meetings between ClickMeeting and Salesforce:

- **Bulk synchronization** - Runs automatically every 15, 30 or 60 minutes, depending on the Sync Frequency chosen by System Administrator.
- **Manual synchronization** - Due to API calls limitations, an automatically synced meeting can be synced for the second time after 12 hours. Sync any particular meeting manually using the **Import data now** button at the top of the detail page of each meeting.

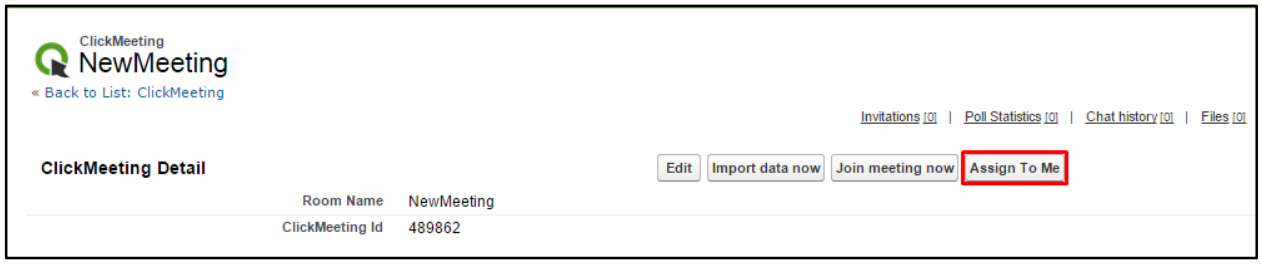


Meetings scheduled and edited in Salesforce sync with ClickMeeting automatically on a regular basis.

Access to Historical Data

To get access to past ClickMeeting webinars and meetings, users can schedule download jobs to synchronize data between Salesforce and ClickMeeting. Go to the **ClickMeetingAdmin** tab and choose a **Synchronization Start Date**.

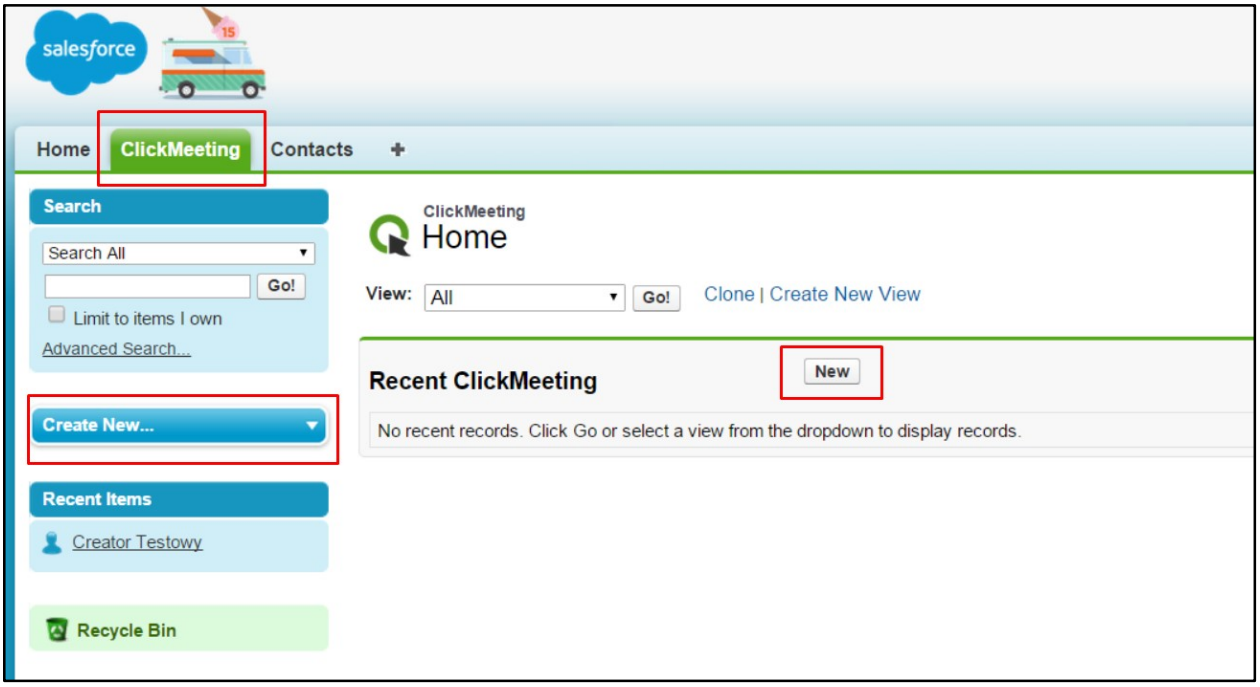
Users with Creator or Viewer permission can see all downloaded records but can't edit them. To edit an active record, a user must be the record owner. A user with ClickMeetingCreator permission can click the **Assign to me** button to change a record's ownership.



User Manual

New Event

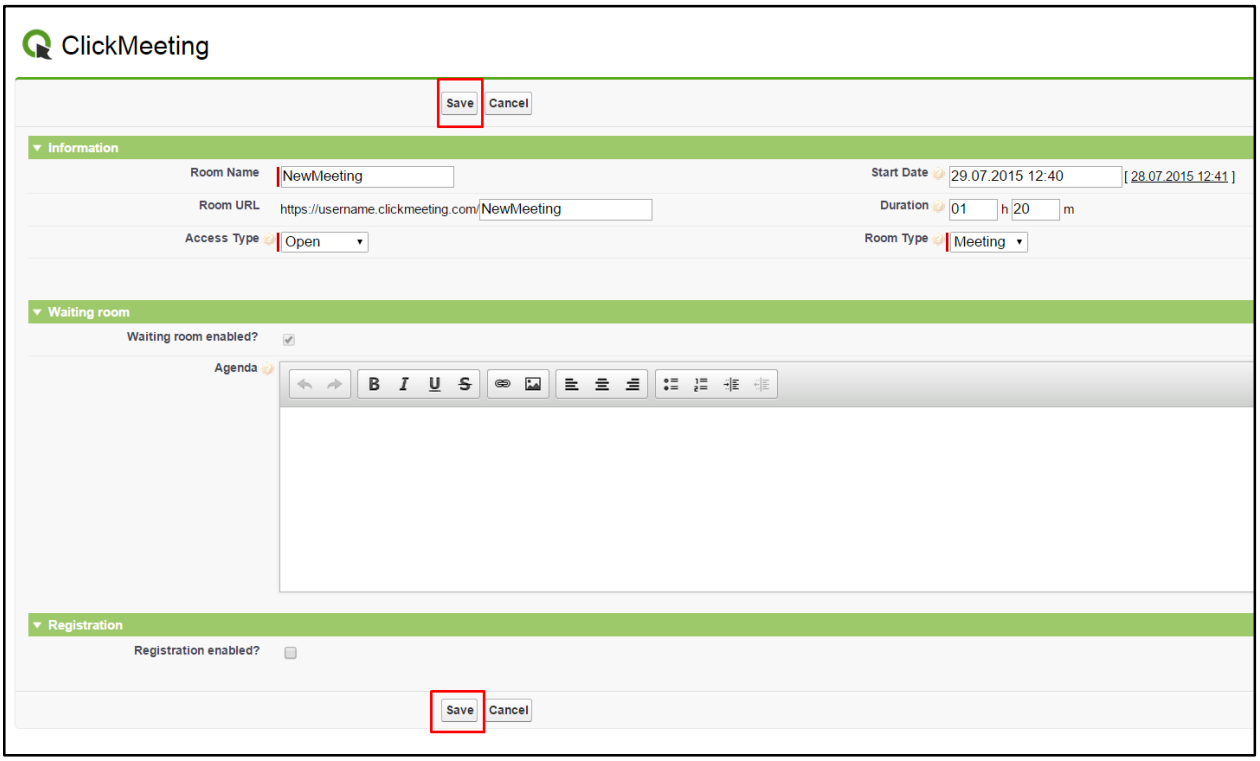
To create a new event, go to the **ClickMeeting** tab and click the **New** button or **Create New** drop-down.



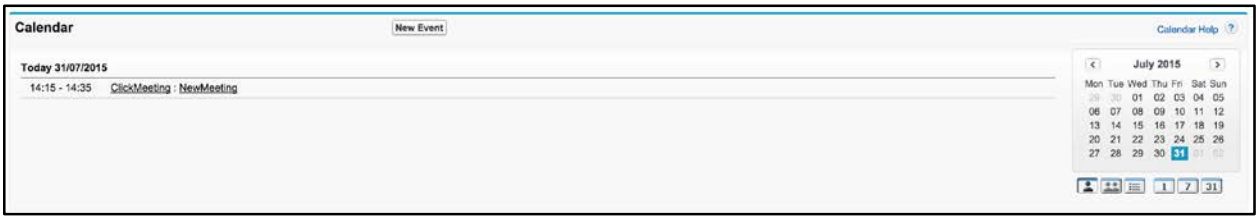
A screen will appear containing the following fields:

- **Room Name** – Choose a name for your room.
- **Room URL** – Enter the suffix of the URL redirect to your room. The field fills in dynamically with the name of the room, which you can edit.
- **Access Type** – You can create meetings that are Open to all, Password protected, or Token protected. Use the drop-down list to define the access type. If you select Password, an additional field appears, where you can set a password to your room. The password will be sent to guests in the invitation email.
- **Start Date** – Use the calendar to set the date of your meeting. The default date is one hour later than the current date, but you can choose any date.

- **Duration** – Enter the estimated duration of your meeting. The system defaults to 5-minute minimum and 3-hour maximum, but the meeting can be as long as you wish.
- **Room Type** – Choose Meeting or Webinar
- **Waiting Room Enabled?** – Check the box to enable the waiting room.
- **Agenda** – If the Waiting Room is enabled, you may add an event agenda to display in the Waiting Room.
- **Registration Enabled?** – Check the box to enable event registration.

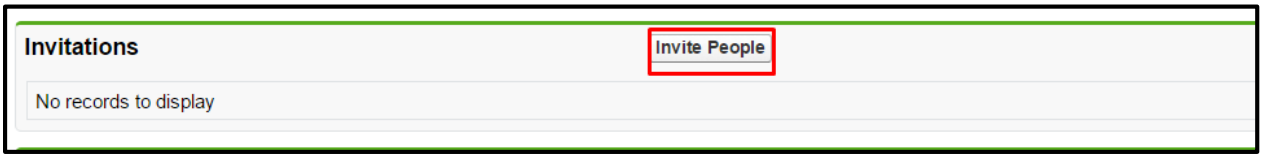


After filling in all necessary fields, click **Save**. A screen with event details will appear. The event will appear in your calendar on the **Home** tab (if your Salesforce license includes access to the calendar) and when you log into your ClickMeeting account.

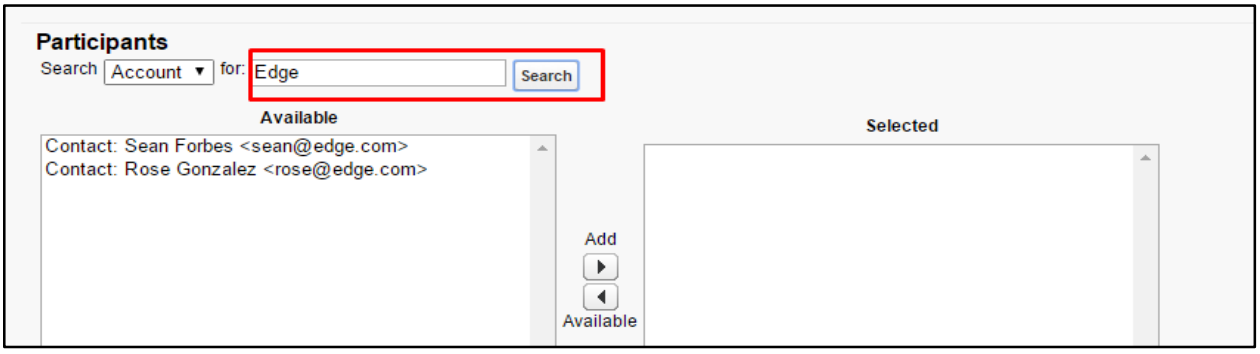


Inviting Attendees

To invite attendees, go to the **Invitations** section on the event detail page.



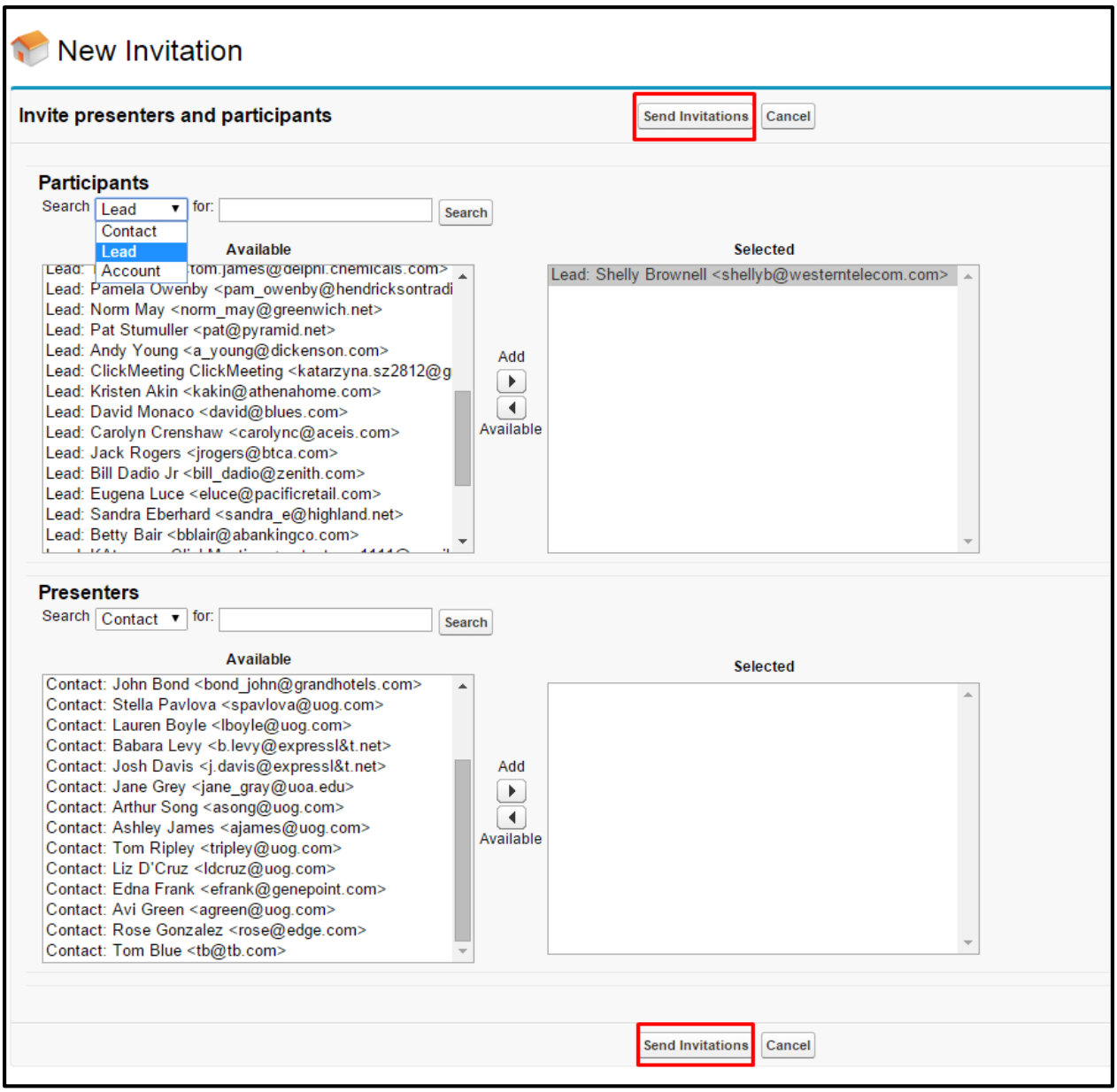
- Click the Invite People button to view two multi-picklists, one for Participants and one for Presenters. By default, all Contacts and Leads appear in the Available section of both picklists.
- In the Participants section, select Leads and Contacts you want to invite as participants.
- To view contacts assigned to a specific account, set the drop-down to Account. Then type the account name (or a snippet) and click the Search button.
- Optionally, use the Search field to find specific first names, last names, or email addresses.
- Use the Add button to move contacts to the Selected side. Use the Available button to move Selected names back to the Available side.



To select Presenters, go to the Presenters area and use the same procedure as above.

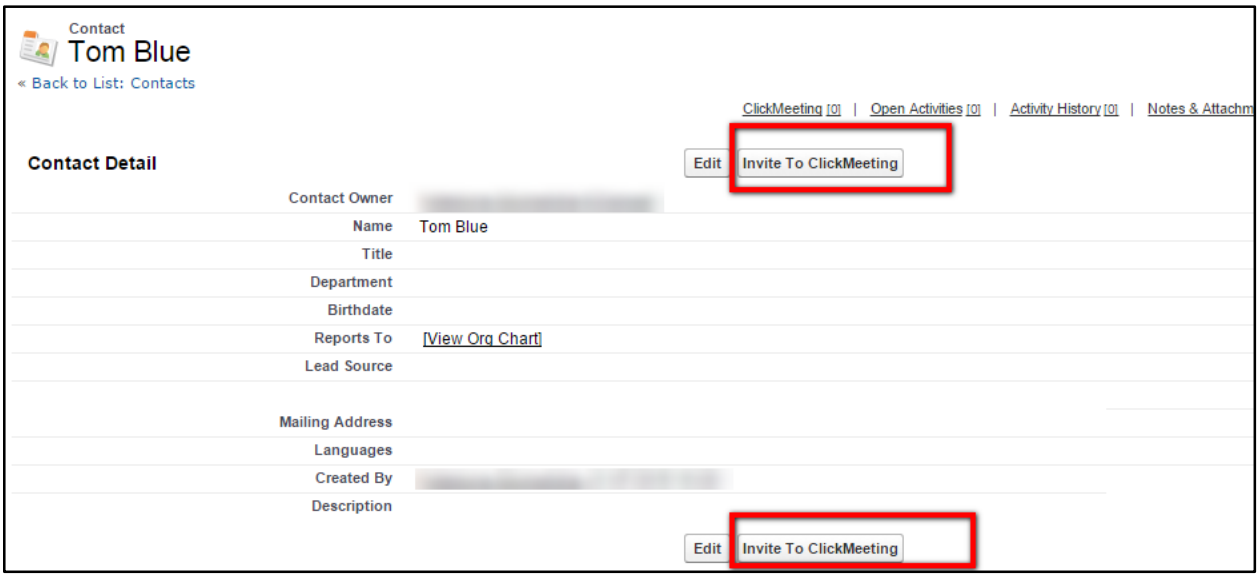
When you are happy with the lists of Selected Participants and Presenters, click the Send Invitations button.

> **Caution:** You cannot un-invite people; they will receive email invitations immediately after you click the Send Invitations button.

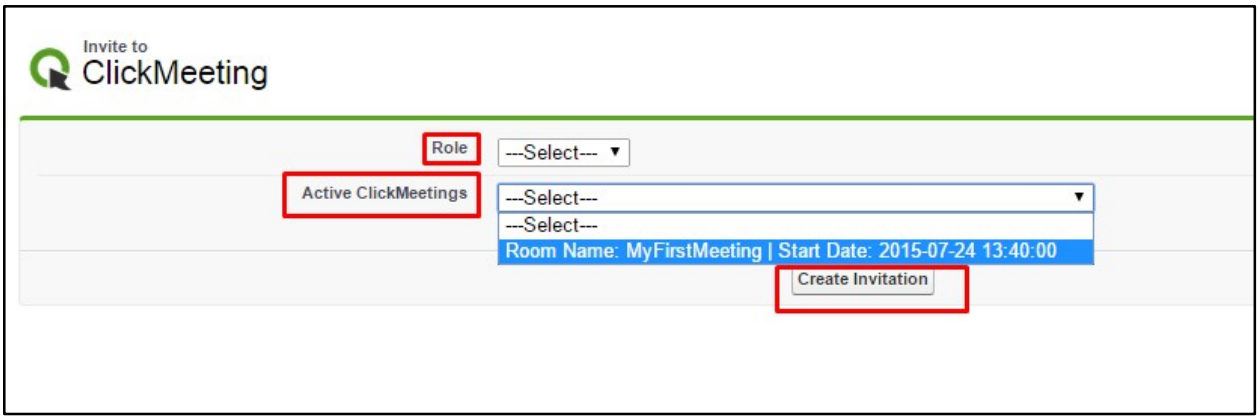


After you click **Send Invitations**, your guests will appear on the detail page of your event in the **Invitations** section.

You can also add attendees directly from their Lead or Contact page. Go to the Contact or Lead tab, choose the Contact or Lead you want to invite, and click the **Invite to ClickMeeting** button.



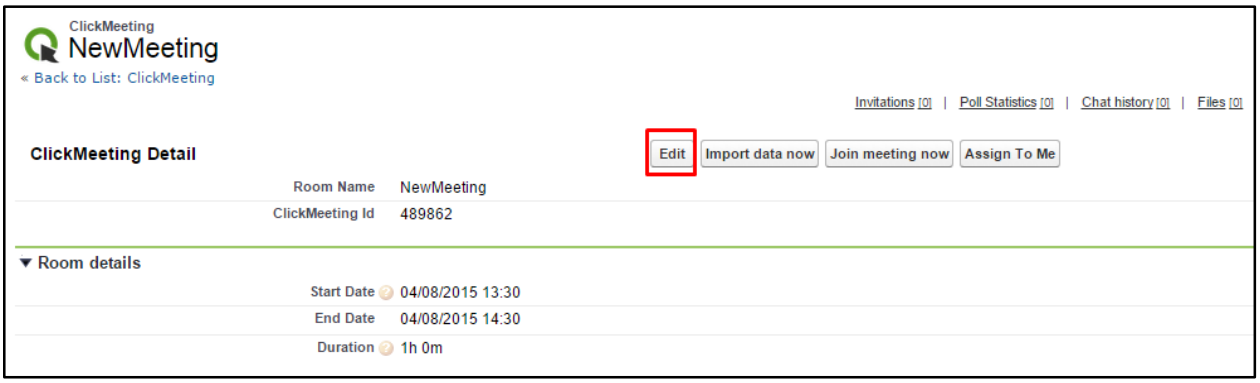
On the next screen, select the role and event for your attendee and click **Create Invitation**. Your guests will appear in the **Invitations** section.



Note: The Active ClickMeetings drop-down list contains only ongoing events and events with a future Start Date. If you don't see a particular event on the list, the event date has passed, or the user has already been invited to the event.

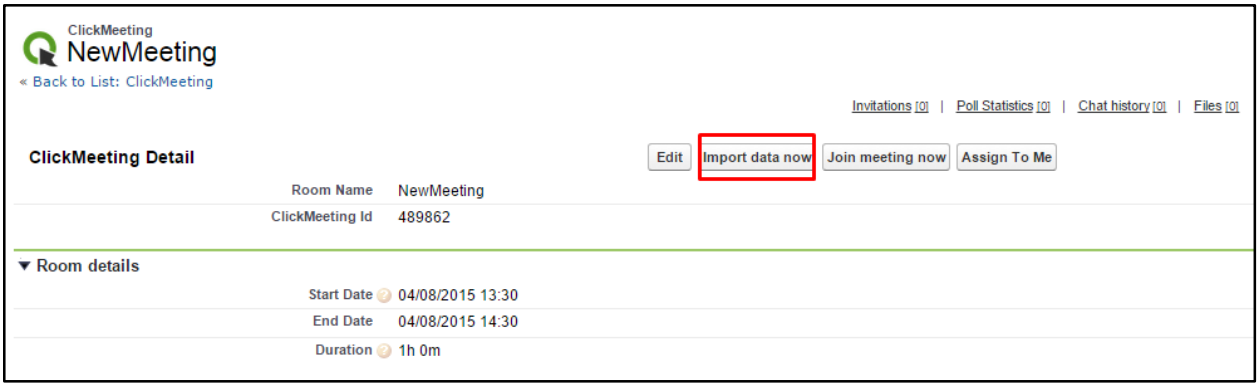
Editing Events

To change the details of your event, go to the **ClickMeeting** tab and select an event to edit. On the event detail page, click the **Edit** button.



Enter the changes and click **Save**. If you decide to reschedule the event, change its name, or change the access type to password or token, attendees will receive a new invitation with new event details.

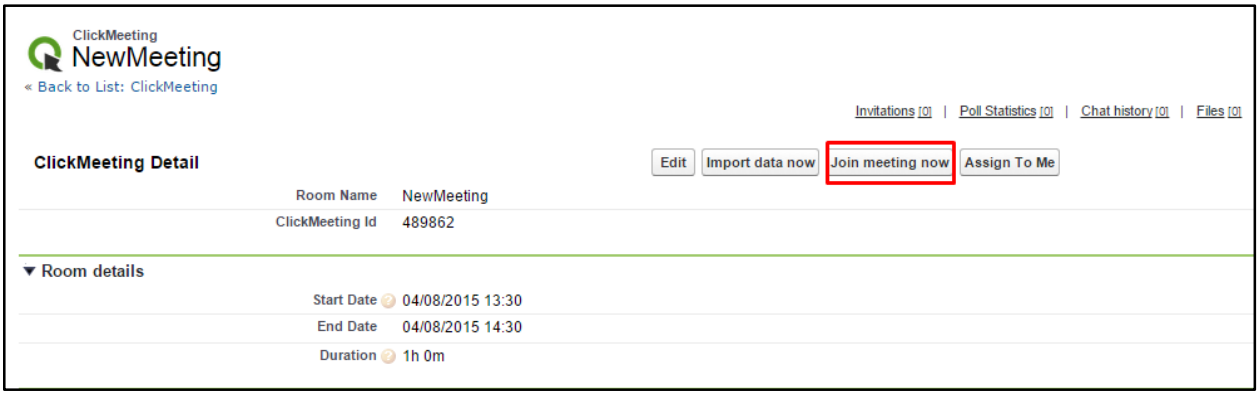
If you edit the meeting using ClickMeeting and want to see the changes in Salesforce, you can wait for automatic sync or update the event manually by clicking the **Import data now** button.



Joining an Event

Join an event as a host by clicking the **Join Meeting Now** button on the meeting detail page.

To use the **Join Meeting Now** button immediately after creating the meeting, refresh the page or click the **Import data now** button.



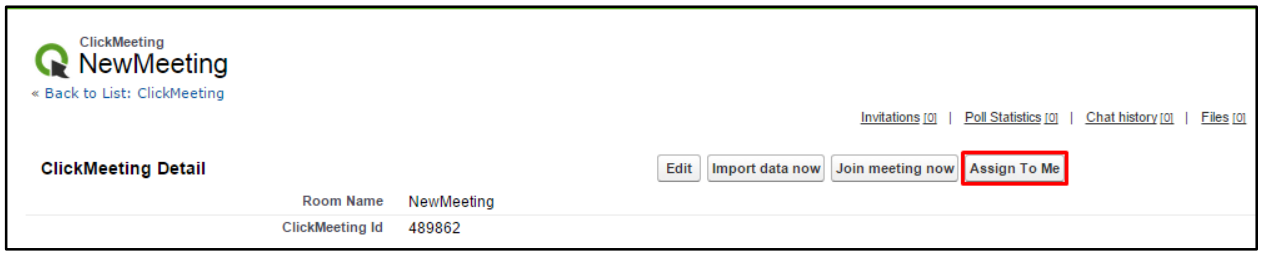
Guests can join an event by clicking the URL provided in the invitation email.

Browsing Historical Events

For access to past ClickMeeting webinars and meetings, your system administrator must synchronize data between Salesforce and ClickMeeting.

Users assigned as Creators or Viewers can view all records but not edit them. Only the owner of an active record can edit it.

If you are an assigned ClickMeetingCreator, you can use the **Assign To Me** button to change the ownership of a record you own.



Registration

The ClickMeeting for Salesforce app enables users to browse data provided by participants during meeting registration.

When a Participant or Presenter enters data during registration, the app matches the email address to an existing Lead or Contact and binds new data to the existing record. If the email address does not match an existing record, the app adds the email address as a new Lead.

If meeting registration is not enabled, participants provide name and email address.

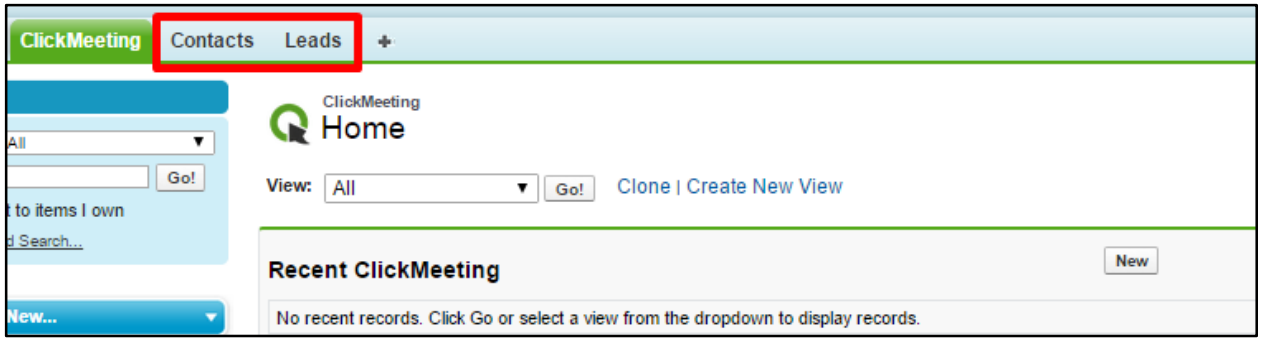
- If an email address does not exist as a Lead or Contact, a new Lead is created, and fields such as Last Name, Company, and Lead Source are filled in with the “ClickMeeting” value. First Name is filled in using registration data.
- If an email address exists as a Lead or Contact, Salesforce data is not modified. Registration data goes into a separate field called Login.

If meeting registration is enabled, participants provide their first name, last name, email address, and (optionally) other fields.

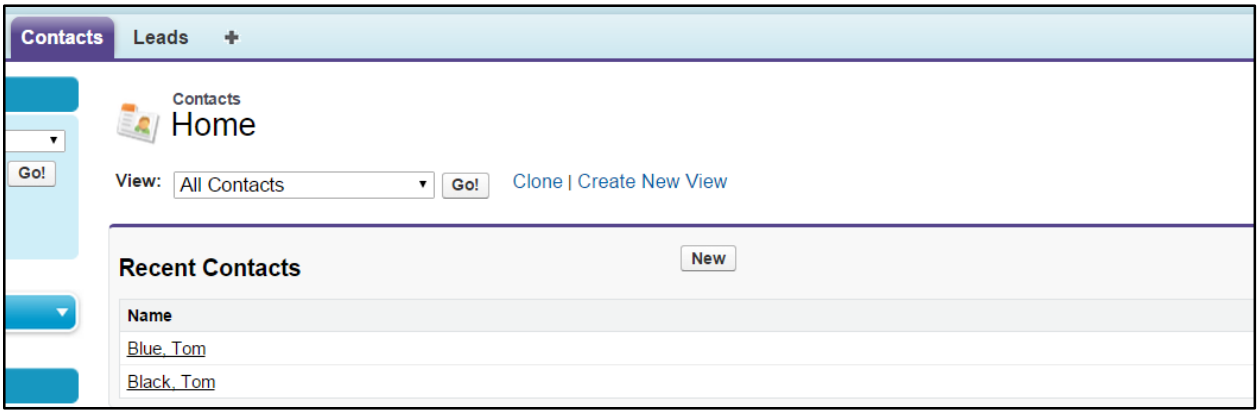
- If an email address does not exist as a Lead or Contact, a new Lead is created, and fields such as First Name and Last Name are filled in using registration data. Company and Lead Source are filled in with the “ClickMeeting” value.
- If an email address exists as a Lead or Contact, data stored in Salesforce is not modified. Registration data goes into separate fields called Login and Registration.

To display data gathered during a specific registration:

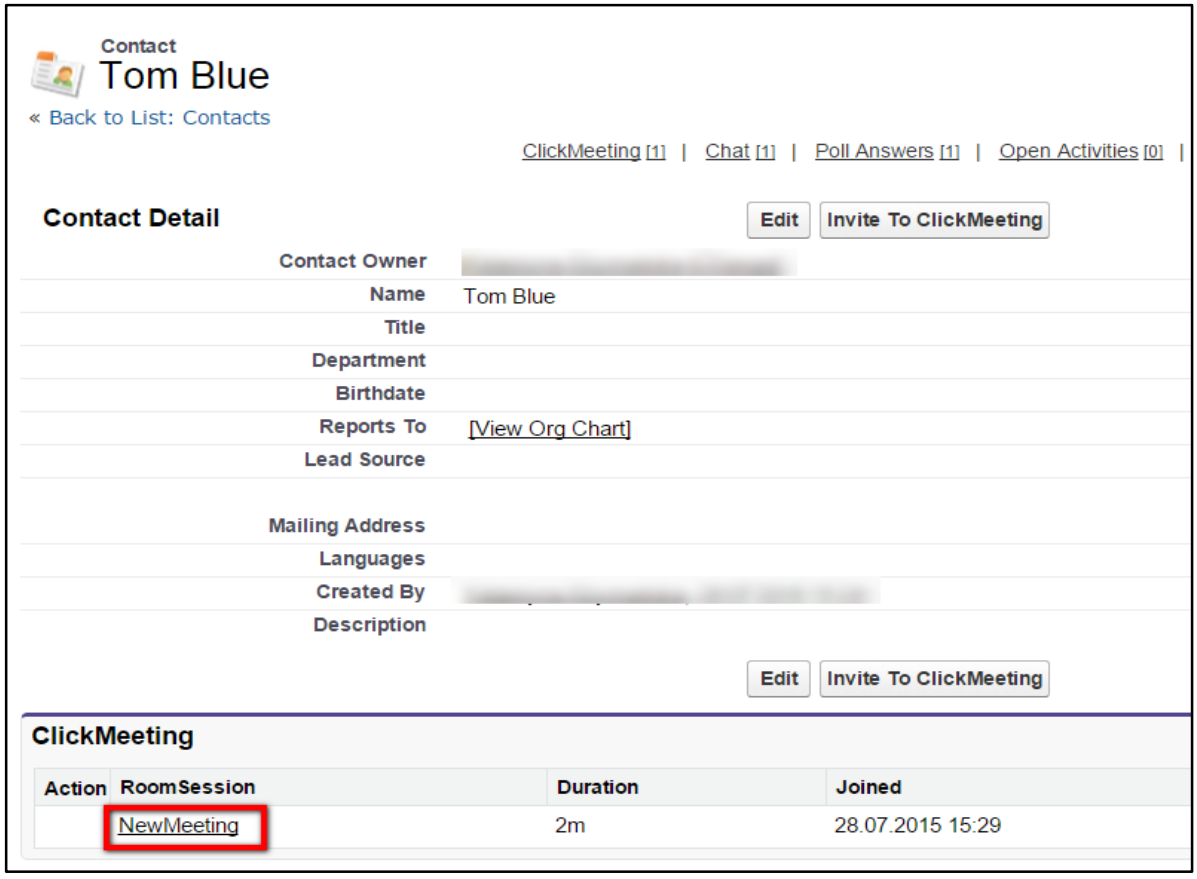
Go to the Contacts or Leads tab



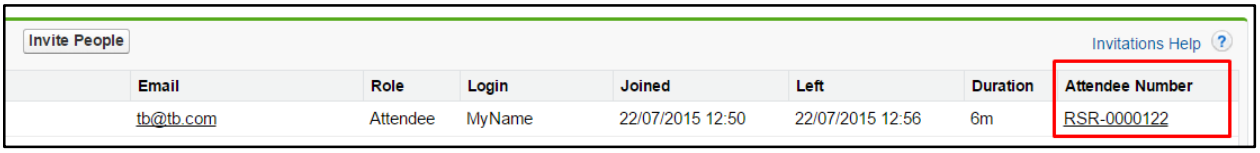
Select a Contact or Lead



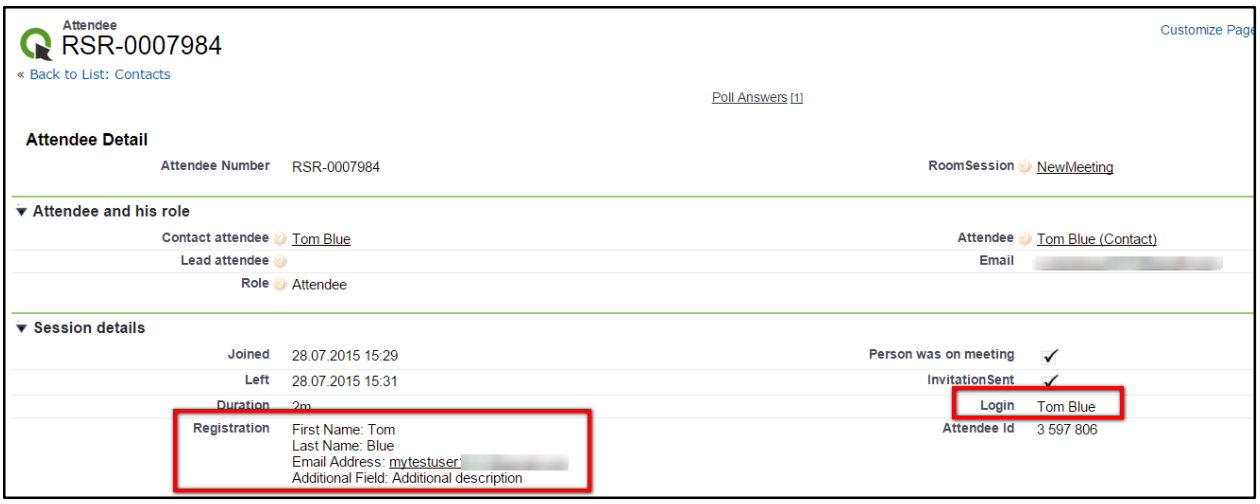
Go to the ClickMeeting section of the Contact profile and click a meeting to display.



In the invitation section, click the Attendee Number of the Contact or Lead.



Registration data appears on the Attendee detail screen in registration and login fields.


Attendee
RSR-0007984
Customize Page
« Back to List: Contacts
Poll Answers [1]
Attendee Detail
Attendee Number
RSR-0007984
RoomSession
NewMeeting
Attendee and his role
Contact attendee
Tom Blue
Attendee
Tom Blue (Contact)
Lead attendee
Email
Role
Attendee
Session details
Joined
28.07.2015 15:29
Person was on meeting
Left
28.07.2015 15:31
InvitationSent
Duration
2m
Login
Tom Blue
Registration
First Name: Tom
Last Name: Blue
Email Address: mytestuser
Additional Field: Additional description
Attendee Id
3 597 806

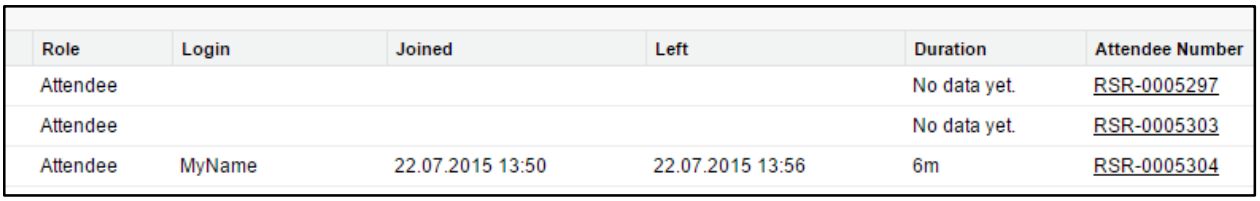
Browsing Polls, Chats, Documents, and Recordings

After your meeting or webinar, the event detail page displays data such as total visitors, peak visitors, poll statistics, chats, files, and recordings.

The Invitation section displays guest activity: present or absent, role, login, arrival and departure times, and duration of their visit.

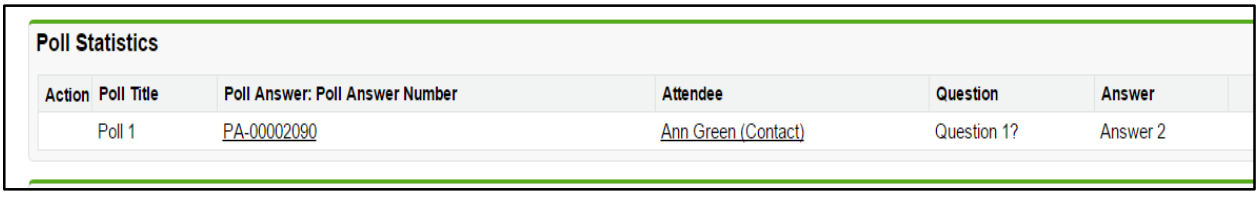
Invitations — Invite People

Action	Person was on meeting	Attendee	Email
	☐	Tom Blue (Contact)	mytestuser
	☐	Adam Brown (Contact)	mytestuser
	✓	Ann Green (Contact)	mytestuser



Role	Login	Joined	Left	Duration	Attendee Number
Attendee				No data yet.	RSR-0005297
Attendee				No data yet.	RSR-0005303
Attendee	MyName	22.07.2015 13:50	22.07.2015 13:56	6m	RSR-0005304

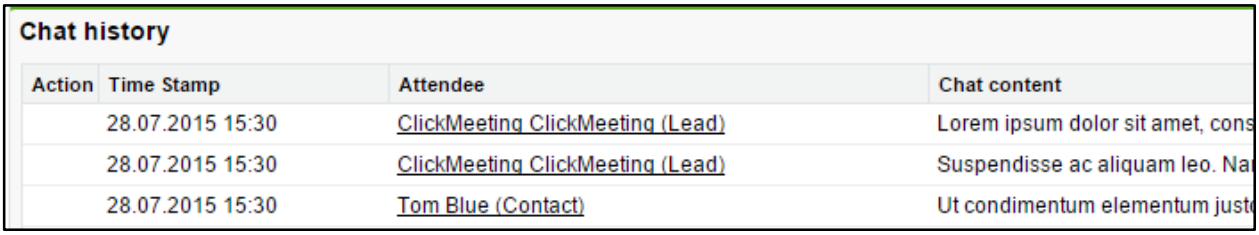
The Poll Statistics section displays links to survey results and attendee answers to questions.



Poll Statistics

Action	Poll Title	Poll Answer: Poll Answer Number	Attendee	Question	Answer
	Poll 1	PA-00002090	Ann Green (Contact)	Question 1?	Answer 2

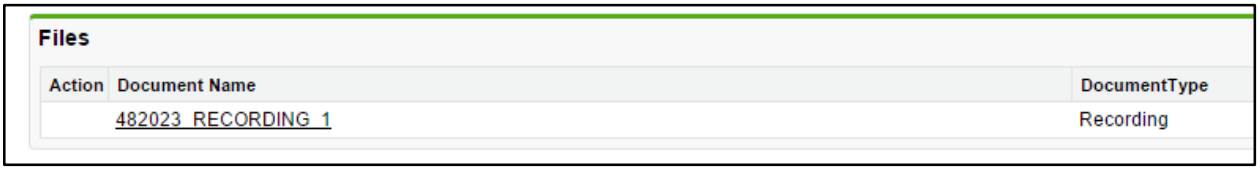
The Chat History section displays the chat stream of each ClickMeeting event:



Chat history

Action	Time Stamp	Attendee	Chat content
	28.07.2015 15:30	ClickMeeting ClickMeeting (Lead)	Lorem ipsum dolor sit amet, cons
	28.07.2015 15:30	ClickMeeting ClickMeeting (Lead)	Suspendisse ac aliquam leo. Na
	28.07.2015 15:30	Tom Blue (Contact)	Ut condimentum elementum just

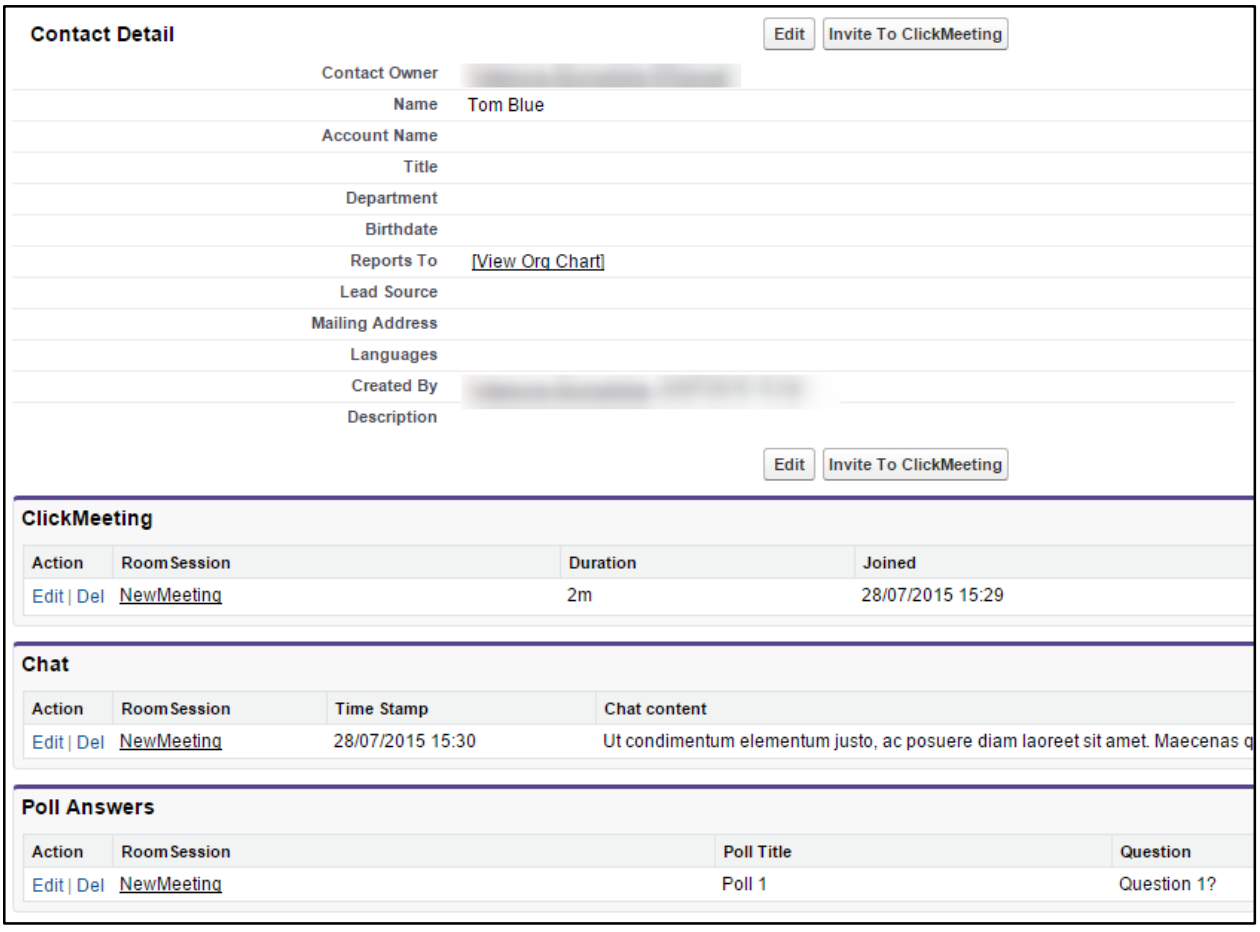
The Files section displays links to recordings captured and documents attached during the meeting. To download a file, click the Document Name. When the detail screen appears, click the URL.



Files

Action	Document Name	DocumentType
	482023_RECORDING_1	Recording

From a Contact or Lead Profile, browse meeting data such as meetings, chats and poll answers.



Contact Detail Edit | Invite To ClickMeeting

Contact Owner	[redacted]
Name	Tom Blue
Account Name	
Title	
Department	
Birthdate	
Reports To	[View Org Chart]
Lead Source	
Mailing Address	
Languages	
Created By	[redacted]
Description	

Edit | Invite To ClickMeeting

ClickMeeting

Action	Room Session	Duration	Joined
Edit | Del	NewMeeting	2m	28/07/2015 15:29

Chat

Action	Room Session	Time Stamp	Chat content
Edit | Del	NewMeeting	28/07/2015 15:30	Ut condimentum elementum justo, ac posuere diam laoreet sit amet. Maecenas q

Poll Answers

Action	Room Session	Poll Title	Question
Edit | Del	NewMeeting	Poll 1	Question 1?

Getting Help

If you have questions or need advice, our Customer Success Team is always glad to help. Visit the ClickMeeting Contact page to reach us by email, phone, or chat.